

Excerpt from DA Pam 608-42,
Information and Referral
Service for Army Community
Service Centers on Interviewing
Skills, Information Giving and
Referral and Follow-up.

Purpose: To introduce new I&R staff to interviewing concepts and the importance of understanding people.

Time: 3½ hours.

Materials: Outline of presentation (as shown below).

Presentation and Participation: Trainer to present, lead discussion and summarize the training material shown below. The trainer may supplement with examples and other material as desired. Each subsection may be role played with the trainee posing as the client and the trainer as the interviewer.

a. Interviewing: Definition and Purpose. Interviewing is not an unusual activity. Most individuals today have been interviewed a number of times, for school, for jobs, in transacting business or in dealing with agencies in the private and public sectors. Interviews usually involve an interviewer and a person or persons being interviewed. The interview itself may be defined as a type of conversation for the purpose of imparting and receiving information. In an I&R service the purpose of interviewing is to obtain sufficient information regarding a client's problem to effect linkage with appropriate community service.

b. Interviewing Problems. The person contacting the service may be uncertain about information needed and only vaguely aware of basic problems and in expressing their thoughts clearly. This is often true of the handicapped, aged, depressed, or young inexperienced person. For these reasons, interviewing must explore the general needs of a person, and must be sensitively conducted to be productive. The interviewer can learn to conduct interviews with the necessary skill and sensitivity by developing awareness of human needs and feelings.

c. Common Human Needs and Differences.

(1) Human beings are alike in certain basic ways. Some areas of common need include the need for food, clothing and shelter, safety and security, the need to love and be loved, the need to be cared for, and to be recognized as a person, the need for human dignity.

(2) It is important to realize that human beings are also different. There are cultural and economic differences which subdivide humanity into groups, and personal differences which render every individual unique. The interviewer should recognize the individuality of all clients and not treat them categorically as members of age, ethnic, racial or religious groups, although it is important to be aware of the general kinds of problems encountered by members of particular populations.

d. The Importance of Understanding Human Feelings.

(1) In developing a sensitivity toward human feelings, it is necessary to understand our own. One kind of feeling which we all share is prejudice. Although it is easy to like and agree with people who are like ourselves, sharing our values and living like ourselves, it is not as easy to understand those who do not share our values and follow a different style of life. Some people find that they can tolerate some kinds of differences but not others. For example, a person tolerant of soft drug abuse might be very intolerant of profane language. Sometimes we are scarcely aware of such personal prejudices. It is very important for us to increase our awareness of those feelings if we are to help the client fully.

(2) Other feelings that impact situations are learned social responses. For example, if a person seems rude or angry with us in a social situation or ordinary business transaction, we must learn to control our feeling responses if we are to conduct a productive interview. Understanding our own feelings and those of the client is essential in maintaining control.

e. The Influence of Situations on Human Feelings. Feelings are not always easy to control because they are not necessarily rational. In times of stress, human emotions often become difficult to manage. Workers in the human services area are especially likely to encounter individuals and families who are under stress. It is important for interviewers to recognize that many clients are under

Unit III. Human Needs, Interviewing Skills, Information Giving and Referral, and Follow-up

Section A: Background for Interviewing: Common Needs and Feelings.

pressure from difficult situations. Generally, they have exhausted their own resources through a series of very frustrating attempts. Sometimes they have not known where to turn and have bottled up their own fears and anxieties for periods of time. They may feel needed services have been denied arbitrarily or because of discrimination. It is difficult to work with them because of their feelings.

Section B: Interviewing

Purpose: To continue staff orientation to interviewing in information and referral services.

Time: 3½ hours.

Materials: Outline of presentation (as shown below).

Presentation and Participation: Trainer to present, lead discussion and summarize training material below, supplementing with examples and other material as desired. The trainer may wish to role play examples. To illustrate subsection c, the trainer may wish to assume the role of the interviewer and demonstrate how to handle an inquiry.

a. Some Concepts Underlying Successful Interviewing. Belief in the dignity and worth of human beings is essential in human service interviewing. It is manifested in the following areas of good interviewing.

- (1) Listening attentively.
- (2) Using sensitivity in communicating with the client.
- (3) Respecting the client's right to confidentiality.

b. Starting the Interview.

(1) At the beginning of an interview, the client is often uncomfortable and lacking self-confidence. The experienced interviewer understands that this may be for a variety of reasons, not the least of which is that many clients have never sought help from anyone beyond the familiar circles of family and friends.

(2) The interviewer should begin by creating an atmosphere which encourages the client to provide information. Fears and apprehensions need to be minimized. The interviewer's tone of voice and choice of words are important. If the interviewer shows that he or she is a good listener and conveys a genuine sense of interest and warmth, a relationship can be established for permitting a productive interview to follow.

(3) In many instances, it is helpful for the interviewer to begin by explaining the purpose of the I&R service. Sometimes, it is necessary to note the limitations of the service. For example, the service does not provide medical services, but it can provide access to the needed service. When the client understands the kind of help the I&R service offers, he or she will be encouraged to discuss his or her problem.

c. Identifying Problems.

(1) The interviewer who is a good listener will sometimes recognize that the client has a problem which is different and more basic than the one he or she is calling about. The client may be unaware of this problem, or the possibility of its solution. The interviewer must be willing to involve himself or herself with the problem presented by the client as well as with the more basic problem if one is recognized.

(2) It is a difficult and often delicate matter to look for underlying problems, especially when the problem lies in a personal and sensitive area. Sometimes a client will not feel free to speak out the first time he or she calls. He or she might call again another time. Or he or she might receive help for an underlying problem from the agency which the interviewer recommends. The interviewer should recognize that the right of privacy belongs to every person, and the client has the right to choose not to discuss further problems. However, the tact and skill of the interviewer often determines the degree of depth of the interview.

Section C: Information giving and referral

Purpose: To continue staff orientation to interviewing.

Time: 3½ hours.

Materials: Outline of presentation (as shown below).

Presentation and Participation: Trainer to present, lead discussion and summarize material below, supplementing with examples and other material as desired. The trainer should give special attention to the use of the resource file. The recording forms may be introduced in this section.

a. Information Giving. Information giving is an integral part of the interviewing process. It occurs when the interviewer provides information to the client, and usually follows or alternates with information collecting. Shown below are some specific aspects of information giving.

(1) Linking needs and resources.

(a) After obtaining the needed information from the client, the interviewer brings into use his or her knowledge of community resources. The resource file plays an invaluable part in this process. When the interviewer's information is sufficient, he or she can determine the appropriate resource(s) and impart this information to the client. When more than one resource is available, the interviewer can encourage the client to use his or her right of choice. Only significant information should be imparted; irrelevant information about the resource is not useful and can be confusing.

(b) Basic to all information giving about resources is the name, address, and telephone number of the agency and/or organization, the name of the person to contact, and directions for getting there.

(c) In giving information, it is the responsibility of the interviewer to ensure that the client understands. Communication difficulties often prevent the client from understanding information when it is given. This can happen for a variety of reasons. Sometimes it is necessary for the interviewer to repeat or rephrase the information.

(d) During the information giving process, the interviewer sometimes encounters anger not previously surfaced during the interview. Sometimes is the fault of the interviewer; often it is the result of frustration and uncertainty. Or it may be caused by a mistake or a misunderstanding. The interviewer can acknowledge it and apologize if the mistake or misunderstanding belongs with him or her; if it is the client's, the interviewer can explain and clarify the matter with enough sensitivity to avoid embarrassing the client. Sometimes the anger is expressed by remarks which may be offensive to the interviewer, such as racial slurs or diatribes against certain types of services. This is not the time for expression of the interviewer's own viewpoint. In the case of criticism of certain services, it may be helpful for the interviewer to offer factual information in the effort to get the client back on the interview track. This requires delicate handling and good judgment. Generally speaking, when anger arises at any stage of interviewing, the interviewer should be ready to meet such circumstances with an understanding of human feelings and acknowledge his or her own reaction to them.

(2) *Ending the interview.* When the request has been understood and the appropriate information given, the purpose of the interview has been completed. Some clients will not want to end for a variety of reasons. At such times, a tactful statement should suffice to end the call, such as letting the client know you were happy to be of help, or sorry you were unable to be more helpful. In some cases, letting the client know that he or she may call back to let you know if he or she was successful can help to end the conversation.

b. Referral. Referral may be of two types: simple or complex (see para 2-3 a of this handbook).

(1) Reason for Complex Referral.

(a) Complex referral is sometimes necessary because of physical and/or emotional problems. The interviewer can sometimes recognize that a client has been emotionally exhausted simply by calling the information and referral service, and contacting another agency would be beyond his or her ability.

(b) Complex referral is also necessary because some agencies have policies which require a formal referral before service can be offered. The resource file is useful in identifying those agencies which require referral from an authorized facility.

(c) In addition, many clients do not use the information which would help them even though they understand the action they need to take. Uncertainty, unfamiliarity and fear sometimes prevent people from speaking in their own behalf. Under such circumstances, extra support can help to bring the person together with the appropriate community resource.

(2) *Complex Referral.*

(a) Complex referral involves the interviewer establishing a definite appointment for the client.

(b) On contacting the resource agency, the interviewer should be ready to impart the following information.

1. Name of client.
2. Address of client.
3. Telephone number.
4. Problem of client.
5. Time when client can keep appointment.
6. Name of interviewer making referral.
7. Name, address and telephone number of service.

(c) After setting up the appointment, the interviewer should telephone the client back to let him or her know the following details.

1. Name and address of resource agency.
2. Date, time and place of appointment.
3. Name of person who will be seeing the client.
4. Any other pertinent, helpful information.

(d) Where conference call equipment is available and practical, the formal referral can be made with client, interviewer, and contact person at the resource agency participating. This involves the client acting on his or her own behalf, which tends to have a beneficial effect, and eliminates the need for the interviewer to call back to give information.

c. *Follow-up.* Follow-up consists of contacting the referral agency and/or the client to find out whether or not contact has been made and the service is being provided. It is a required element in all complex referral cases. Procedures for conducting telephonic follow-up should be discussed per paragraph 2-3 c of this handbook.

Section D. Review of Interviewing, Information Giving and Referral, and Follow-up.

Purpose: To summarize the interviewing process, to reinforce some major points, and to clarify some procedures.

Time: 3½ hours.

Materials: Outline of presentation (as shown below).

Presentation and Participation: Trainer to summarize and lead discussion of the material presented in Unit III, including the material shown below.

a. Purpose of interviewing is to gain sufficient information for the interviewer to make a referral or give helpful information. The client needing help should be:

- (1) Received with courtesy and understanding.
- (2) Given an opportunity to present questions and views of the need.

(3) Supplied with correct information about the agencies involved.

(4) Guided to proper and appropriate source of help.

(5) Presented an explanation of why he or she is being guided to an agency.

(6) Assisted in locating, contacting and making application to the agency, if necessary.

b. Interviewer should determine the problem and do the following.

(1) Grasp the client's feeling about his or her situation and how he or she defines it.

(2) Find out what the client would like to do about the problem.

(3) Find out what resources have already been investigated and with what result.

c. It is important that the interviewer consider the following in making referrals.

(1) Know the limitations and scope of services of agencies.

(2) Find out the problem.

(3) Determine appropriate resource.

(4) Ascertain if the client is being helped or has been helped by any other agency.

(5) Explain services available: choices, alternatives.

(6) Determine if the referral is acceptable to the client.

(7) If referral is unacceptable to the client, find out the reason. There may be a need for further clarification of agency services and policies.

(8) Let client know what information the agency will require, and for what reason.

(9) If you need to leave the telephone to get information or for any purpose, let the client know what you are doing and why.

(10) If you need to make calls to get information about a person, it is necessary to let him or her know that you are doing it and why.

(11) It is not necessary to defend agency practices to the client, but never criticize them to the client. It is better to focus on the client's needs and problems and how to obtain the needed services.

d. Several things are important to note as they relate to handling requests.

(1) Although the interviewer realizes immediately that little can be offered a client, some time is spent talking to the individual. It is important to explain—as far as possible—why this is the situation. This is explained in terms of the "resource system." An attempt is made to make appropriate suggestions to help the individual deal with his or her own problem. By deliberately creating an atmosphere of accessibility the client will likely call again with other needs.

(2) Questions are asked in order to explore all aspects of the problem and to uncover additional needs for which services may be available.

(3) A judgment is made as to the client's ability to follow through on a referral. For those who seem less able, the interviewer participates more fully in getting them to sources of help. The other side of this has to do with agency accessibility. If it is learned by our own experience that a particular agency is unresponsive to any degree, initial contact is frequently made for the client.

(4) Unless is clearly apparent, the client is told why a particular agency is suggested, the services that are offered, and the best way to communicate with the agency (in-person, letter, or by telephone) as well as how to make the request if this information seems necessary.

e. Purpose of follow-up is to determine the outcome of complex referrals. When conducting agency follow-up, it is important to stress that this is part of ACS' efforts to assess and evaluate its own program operation.